



**Northamptonshire
Community Foundation**
Giving back to our county

Donor Care Policy

Version 1.0 - June 2026
Review date: 2029



Registered with
**FUNDRAISING
REGULATOR**



Northamptonshire Community Foundation is a charity registered in England and Wales No. 1094646,
and a Company Limited by Guarantee (4269030)



1. Purpose

Northamptonshire Community Foundation exists to inspire philanthropy and connect people who want to give with local communities and causes that need support. This policy sets out how we care for donors, manage gifts responsibly, and ensure that donor relationships are handled with professionalism, confidentiality, and respect.

The Foundation recognises that donor trust is central to its work. We are committed to being transparent, ethical, and clear in all dealings with donors, prospective donors, fund holders, fund advisers, professional advisers, and supporters.

2. Our commitments to donors

We will always:

- Treat donors and prospective donors with respect and courtesy.
- Be honest, accurate, and transparent in our communications.
- Respect donor confidentiality and anonymity requests.
- Avoid undue pressure in fundraising or stewardship.
- Be clear about fees, fund structures, investment arrangements, and the status of any fund.
- Follow donors' wishes wherever these are consistent with law, charity regulation, and the Foundation's governing documents.
- Provide prompt acknowledgement of gifts and appropriate stewardship after donations are made.
- Donors have the right to ask for their details to be removed from our records where this is permitted by law and our regulatory duties.





3. Data and confidentiality

We handle donor information in line with the UK General Data Protection Regulation and the Data Protection Act 2018, as well as our own privacy and data management policies. Personal data relating to donors, prospects, advisers, and associated contacts will be used only for legitimate Foundation purposes and will be kept secure and confidential.

We will not sell, trade, or share donor personal information with third parties without consent, unless required by law or necessary for the proper administration of the Foundation. Staff, trustees, volunteers, and any other person with access to confidential donor information are expected to maintain strict confidentiality.

Where a donor wishes to remain anonymous, we will take special care to protect their identity in internal records, reports, published materials, and acknowledgements, subject always to legal and accounting requirements.





4. Gifts we accept

We aim to be flexible in responding to the wishes of donors, whether individuals, families, businesses, trusts, or other organisations. We welcome donations from legitimate sources and will consider a wide range of gift types, including:

- Cash gifts and regular giving.
- Gift Aid-eligible donations, where applicable.
- Publicly traded shares and similar marketable securities.
- Property, land, or other assets, where these can be accepted safely and lawfully.
- Legacy gifts and other planned gifts.
- Gifts intended for an existing fund, a new named fund, or unrestricted community grant-making.

We may carry out due diligence and checks on donors, gifts, and source of funds to meet legal, regulatory, reputational, and anti-money laundering requirements. We reserve the right to decline any gift where accepting it would not be in the best interests of the Foundation or its charitable purposes.





5. Named funds

We can work with donors who wish to establish a named fund, subject to our fund acceptance procedures and minimum funding requirements. A named fund may support a particular issue, community, place, or charitable purpose, provided it remains consistent with charity law and the Foundation's charitable objects.

Named funds may be structured in different ways, including:

- Endowment funds, where capital is invested and income is used for grant-making over time.
- Flow-through funds, where donations are distributed over an agreed period.
- Combined funds, where part of the gift is invested and part is spent more immediately.

The Foundation will advise on the most suitable structure depending on the donor's goals, the value of the gift, and the level of involvement the donor wishes to have. Any agreement about the purpose, restrictions, or operation of a named fund will be documented in writing.

More information on how we manage named funds can be found in our donor led grant making policy.

6. Legacy and planned gifts

We welcome legacy gifts and other planned donations that support the Foundation's long-term charitable work. Where a legacy is intended for a named or restricted purpose, we will seek to honour the donor's wishes as far as the law and our charitable responsibilities allow.

We encourage donors to take independent legal and financial advice when considering legacy gifts, property gifts, or other more complex arrangements. The Foundation may discuss possible structures, but it does not provide regulated legal, tax, or financial advice.

7. Grant-making and donor wishes

The Foundation's Trustees retain ultimate responsibility for all grant-making decisions and for the proper use of charitable assets. Where a donor has made recommendations or set out preferences, these will be followed wherever possible, provided they are lawful, charitable, and consistent with the fund agreement and in line with our donor led grant making policy.

If a donor-advised fund is in place, recommendations will be considered in good faith and in line with the agreed process. However, the Foundation must not approve grants that would conflict with our charitable purposes, legal obligations, or reputation.



8. Fund advice and involvement

Some donors wish to be closely involved in how their fund is used. Where appropriate, we may offer donor-advised or panel-advised arrangements, subject to our internal policies and legal responsibilities. Donor involvement must always remain advisory rather than controlling, because the Foundation must retain ultimate responsibility for the use of charitable funds.

Donors may also nominate successor advisers, where this is agreed in writing and consistent with the terms of the fund. We will help families, businesses, and organisations plan for succession so that the fund can continue to operate effectively over time.

9. Investment and fees

Funds held by the Foundation are managed in line with our investment policy and the terms agreed with the donor. We may pool investments where appropriate in order to achieve effective oversight, prudent risk management, and better long-term returns.

We may ask you to contribute to the operating and finance costs incurred during the management and administration of the fund. Any applicable charges will be explained clearly before a fund agreement is finalised and will be set out in writing.

The Foundation will apply all such costs in support of its charitable purposes and operating costs. We will always aim to be clear about how a fund is treated, what income it may generate, and what restrictions apply to capital and revenue.





10. Stewardship and reporting

We believe good stewardship is a key part of donor care. We will keep donors appropriately informed about the impact of their gifts, the performance of any fund, and the difference their support is making in Northamptonshire.

Depending on the nature of the gift and the donor's preferences, stewardship may include:

- Prompt acknowledgement of donations.
- Impact updates and case studies.
- Annual or periodic fund reviews.
- Invitations to learn more about projects supported by the donor's gift.
- Visits to beneficiary organisations or community projects where appropriate.

We will balance stewardship with sensitivity, ensuring we do not over-communicate or place any pressure on donors to give again.

11. Disputes and concerns

If a donor, adviser, or fund representative has a concern about any aspect of a gift, fund arrangement, or stewardship relationship, we encourage early discussion with the relevant senior officer. Where needed, issues may be escalated to the Chief Executive and, if appropriate, to the Chair of Trustees.

The Foundation will seek to resolve concerns fairly, promptly, and in good faith. However, final decisions relating to the management of charitable funds rest with the Foundation's Trustees, acting within charity law and the Foundation's governing documents.

12. Changes to this policy

This policy may be updated from time to time to reflect changes in law, regulation, charitable practice, or the Foundation's operational needs. The most recent approved version will always be the version in force.



18 Albion Place
Northampton
NN1 1UD

01604 230033
enquiries@ncf.uk.com
www.ncf.uk.com